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Greece

Citrus

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Report Highlights:

Production for all citrus commodities, including lime, tangerines, and clementines is forecast to increase in 2003/04. Adverse weather conditions hampered the development of some of the crops decreasing fresh orange supplies. Oranges delivered to juice processors are expected to increase. The Minister of Agriculture is in the process of implementing measures that will impose compulsory inspections on all fresh products entering Greece.

Includes PSD changes: Yes

Includes Trade Matrix: No

Annual Report

Rome [IT1], GR

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Situation and Outlook Narrative

The 2002/03 citrus production is expected to reach higher levels compared to a year earlier. Although it is too early for safe predictions, the 2003/04 citrus crop seems to be developing well. An abundance of spring rainfall is expected to facilitate normal blooming and fruit development. If favorable weather conditions prevail, citrus production for the 2003/04 crop is expected to slightly increase or remain at the same level as the 2002/03 production.

Oranges

Orange production in 2002/03 is estimated at 1,200,000 MT, which is 10.3% higher than last year. However, frost, strong winds, and rainstorms, which prevailed in many citrus growing areas such as Arta, Lakonia, and Argolis, hampered the development of fresh oranges, thus, generating an increased quantity of processed oranges.

High expectations in the beginning of the MY 2002/03 for larger fresh fruit production resulted in an increased number of contracts signed between processors and farmers. The quantity of fresh oranges diverted to processing is estimated at 330,000 MT. In this current season, the average yield is 17-18 kg of fresh fruit to produce 1 kg of orange juice (single strength basis). Average price paid to farmers for fresh produce diverted to processing was 0.02 Euros/kg. 2003 exports of fresh oranges are still in progress. According to the Greek Ministry of Agriculture, 254,775 MT have been exported since March 2003, an increase of 11.5% from a year ago. Of this total, 56,179 MT were exported to EU countries compared to 48,052 at this time last year.

Variety	MY 2002/03	MY 2001/02
Valencia	0.22 Euros/kgr	0.13
Maryline	0.13 Euros/kgr	0.59
Navelines	0.14 Euros/kgr	0.14

As shown above, Valentias were exported at a very good price in international markets compared to last year when the exporting activity was delayed. In the key Valencia producing area of Scala Laconias and Peloponnesos, 120,000 MT of Valentias were exported by the end of March 2003. Industry sources report that Maryline variety showed an 80% reduction in exporting activity due to excessive rainfall through January 2003.

Lemons

Fresh lemon production, which was less affected by weather, was more than 2,000 MT above last year. Total output is estimated at 110,000 MT. As previously reported in Annual Report GR 2004, farmers are

gradually abandoning lemon cultivation (due to lower prices they have been receiving) and replacing their crops with apricot trees and grapes, mostly of sultana varieties. An indicative farm gate price for fresh lemons is 0.15 Euros/kg.

Tangerines

According to field contacts, tangerines was the most favorable citrus crop cultivated in the 2002/03 season. Fresh tangerine production is estimated at 87,000 MT, 22.9% percent higher than last year. Exports of fresh tangerines (MY 2002/2003) are still in progress with 33,479 MT already exported to international markets since March 2003. 37 percent of these exports were destined for EU countries. The corresponding export figures during the same period last year were 23,693 MT in total and 8,307 MT shipped to EU markets. Clementines as an early variety, was not adversely affected by the weather.

Policy

In compliance with EU Reg.No. 1148/2001, which imposes compulsory inspections for the normal marketing activity in the fresh fruit sector, the Greek Ministry of Agriculture is about to implement measures that would apply trade quality controls on imported fresh products. Anyone who markets or delivers imported fresh fruit to the Greek market must comply with the new regulations, particularly as it relates to food safety issues (such as avoiding nitrate or other agrochemical contamination).

Random samples will be taken from exported and imported fresh products between EU member countries. Compulsory inspections on all imported fresh fruits will take place on transactions between third-party countries and the EU. Inspections will also be applied to products that are commercialized within EU member domestic markets and for fresh fruits which are destined for the processing sector.

The Greek Ministry of Agriculture is in the process of establishing a database that will register all traders of fresh fruits. All fresh products should be packed according to their quality and country of origin. Labels should show all the necessary food safety information including the name of the trader or farmer. The Ministry of Agriculture expects Greece to be in full harmonization with EU Reg.No. 1148/2001 in approximately two months.

Agricultural Cooperatives

The Greek Government supports Agricultural cooperatives by offering them opportunities for applying consolidation plans, improving administrative structure, and providing incentives for investments. Merging of cooperatives also contribute to more efficient operations and avoids breaking up organizations.

PS&D Table, Fresh Oranges

PSD Table						
Country	Greece					
Commodity	Fresh Oranges				(HECTARES)(1000 TREES)(1000 MT)	
			2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin						09/2003
Area Planted	39650		39650			39650
Area Harvested	39000	39000	39000	39000	0	39000
Bearing Trees	17200	17200	17200	17200	0	17250
Non-Bearing Trees	260	260	260	260	0	220
TOTAL No. Of Trees	17460	17460	17460	17460	0	17470
Production	1076	1076	1170	1200	0	1280
Imports	1	1	1	1	0	1
TOTAL SUPPLY	1077	1077	1171	1201	0	1281
Exports	282	282	370	375	0	385
Fresh Dom. Consumption	503	503	451	496	0	520
Processing	292	292	350	330	0	376
TOTAL DISTRIBUTION	1077	1077	1171	1201	0	1281

PS&D Table, Juice Orange

PSD Table						
Country	Greece				Degrees Brix	
Commodity	Juice, Orange				(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		09/2001		09/2002		09/2003
Deliv. To Processors	292	292	350	330	0	376
Beginning Stocks	1044	1044	4544	4544	3494	3655
Production	14500	14500	19450	19411	0	22116
Imports	18000	18000	8500	8500	0	7800
TOTAL SUPPLY	33544	33544	32494	32455	3494	33571
Exports	9500	9500	10000	9800	0	10000
Domestic Consumption	19500	19500	19000	19000	0	19800
Ending Stocks	4544	4544	3494	3655	0	3771
TOTAL DISTRIBUTION	33544	33544	32494	32455	0	33571

PS&D Table, Fresh Lemons

PSD Table						
Country	Greece					
Commodity	Fresh Lemons				(HECTARES)(1000 TREES)(1000 MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		09/2001		09/2002		09/2003
Area Planted	12000	12000	12000	11800	0	11800
Area Harvested	12000	12000	12000	11800	0	11800
Bearing Trees	4200	4200	4200	4150	0	4130
Non-Bearing Trees	35	35	35	30	0	25
TOTAL No. Of Trees	4235	4235	4235	4180	0	4155
Production	108	108	100	110	0	120
Imports	10	10	10	10	0	8
TOTAL SUPPLY	118	118	110	120	0	128
Exports	8	8	7	18	0	25
Fresh Dom. Consumption	99	99	91	90	0	90
Processing	11	11	12	12	0	13
TOTAL DISTRIBUTION	118	118	110	120	0	128

PS&D Table, Juice Lemon

PSD Table						
Country	Greece					
Commodity	Juice, Lemon				(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		09/2001		09/2002		09/2003
Deliv. To Processors	11000	10000	12000	12000	0	13000
Beginning Stocks	278	278	77	77	85	85
Production	600	600	800	800	0	870
Imports	300	300	320	320	0	300
TOTAL SUPPLY	1178	1178	1197	1197	85	1255
Exports	1	1	2	2	0	3
Domestic Consumption	1100	1100	1110	1110	0	1172
Ending Stocks	77	77	85	85	0	80
TOTAL DISTRIBUTION	1178	1178	1197	1197	0	1255

PS&D Table, Fresh Tangerines

PSD Table						
Country	Greece					
Commodity	Fresh Tangerines				(HECTARES)(1000 TREES)(1000 MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate [New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		09/2001		09/2002		09/2003
Area Planted	7000	7000	7000	7500	0	7500
Area Harvested	6800	6800	6850	7000	0	7100
Bearing Trees	3170	3170	3200	3300	0	3330
Non-Bearing Trees	90	90	65	50	0	25
TOTAL No. Of Trees	3260	3260	3265	3350	0	3355
Production	67	67	85	87	0	90
Imports	0	0	0	0	0	0
TOTAL SUPPLY	67	67	85	87	0	90
Exports	27	27	35	37	0	38
Fresh Dom. Consumption	39	39	48	48	0	50
Processing	1	1	2	2	0	2
TOTAL DISTRIBUTION	67	67	85	87	0	90